

DELIVER EVALUATION

Detailed Analysis of TalisList

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Notes of Reference:

This report describes the evaluation of the resources list tool - Talislist. It was carried out between May and July 2003 at De Montfort University and was part of the JISC funded DELIVER project.

All issues identified in this report are specific to De Montfort University. It should not be assumed that all or any of the ideas expressed in this report will be equally applicable to other HE (or FE) institutions.

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1. Evaluation Background

As part of the DELIVER project, De Montfort University (DMU) decided to evaluate the resource list management software package called Talislist. This decision was based on the user needs analysis activity that documented the resource list requirements. These requirements were translated into a functional specification, which was subsequently used to select among options for fulfilling the user's goals.

There were three options for providing university staff with an electronic resource list system. These were:

- Develop / write a new resource list management system in-house.
- Buy an existing commercial or open source system.
- Develop and enhance existing systems in use.

Due to the availability of resources and the 10-month schedule for the project, it was only possible to progress with one of the options. For DMU, this meant choosing option 2 and obtaining a system for evaluation. Furthermore, because of the existing library catalogue system (Talis) and staff expertise, it was logical for DMU to evaluate Talislist. Nevertheless, owing to the difference in institutional character of LSE, when compared to DMU, it was acknowledged that a different system might be required at the two institutions.

The evaluation consisted of the following:

- installing and setting up the package in the library and integrating it with the existing catalogue.
- inputting a series of existing and representative resources lists.
- training of support staff.
- allowing support staff and teaching staff to interact with the lists in order to be able to comment on the system.
- gathering and analysing feedback.
- reporting the evaluation to the University and the DELIVER project partners.

The evaluation took place from May 2003 to July 2003. It was intended that the evaluation would inform the University of any operational issues with the system and therefore, enable a verified roll out of the system to be developed by the library support staff.

2. Analysis and Evaluation

2.1 Installation and entering lists

The Talislist software was received online and installed at the University. This was then configured and set up by library computer system support staff without any reported problems.

The academic staff involved with the project were asked to provide copies of their resource lists. From these, five lists were selected and entered into Talislist. The people carrying out the task were two library data entry staff, a member of the library's computer system support staff and a member of the DELIVER project team. The five lists were selected because each was from a different subject area and also, each list used a different structure, layout and logic. It was felt that this would test the capabilities of Talislist to represent the pedagogic structures currently used by teaching staff for their resource lists.

The resource lists had a wide range of styles and items and typically included, books, journals, web sites, commercial magazines, databases, videos, CDrom, references to off-prints and e-journals. The lists were often annotated with comments about which items to read and when, which to buy and which to use for revision and course work.

Furthermore, when a list was entered, the structure and layout of each list was retained wherever possible. It was considered that the structure and layout was part of the grammar and syntax of the list and that by trying to remove or replace it, some of the learning benefits of the list may be lost.

The staff that entered the resource lists kept note pads next to their computers as they entered the data. These notes were used to record how long it took to enter the data, any problems that occurred, how they felt about the process and whether they had any suggestions or issues concerning the implementation and maintaining of resource lists using TalisList. These notes are included in Appendix A and contributed to evaluation.

Once the resource lists were completed and had been checked for typographical errors they were "published". This meant that people outside of the library could view them. At this stage the teaching staff that provided the lists were asked to view them and provide some feedback. This feedback is included in Appendix B. Again this feedback added to the evaluation. Staff looked at the lists both from a student and teaching prospective.

2.2 Analysis: Training issues

When the system was installed the computer system support staff trained sufficient library clerical and university research staff to allow this evaluation to take place. The training was carried out informally, using the following method:

The staff being trained gathered around the computer and the support person proceeded by demonstrating the product, showing its interaction with the library catalogue and the systems editing functions. Then each person had a go at adding, deleting and editing a few records from an example list. This was followed by each person taking one of the lists provided by the teaching staff and entering in to the system. Once each list had been completed each person provided feedback to the evaluation.

2.3 Feedback from list compliers

The feedback clearly indicates that it was possible, after only a short period of time, to learn the necessary functions of Talislist. This was typically within an hour. However, it was felt that all users needed and benefited from the initial training session with the systems support staff and ideally needed to have experience of using the online catalogue. This would be true of any new system and demonstrates that Talislist has a good level of utility for providing learning resource lists.

One of the major benefits that Talislist enables is linking the items on a resource list directly to items in the library catalogue. However, the benefits of this link are only truly realised after subject librarians, who can ensure that the most apposite resources are being used, have ratified the resource lists. So, owing to this fact, it is expected that when resource lists are received by the library, in order for them to be as effective as possible, they will first be ratified by subject librarians and then passed to clerical staff to have the actual items added.

It would also be useful if compliers could add keywords to lists. This would assist in the development of a web page listing all electronic reading lists. The system does not have this feature at present.

When Talislist is launched after the DELIVER project has finished, more staff will be trained and a typical training session agenda is included at appendix C.

2.4 Feedback from staff evaluation meeting

A meeting with academic, support and project staff was held to conclude the evaluation of Talislist at DMU. The meeting had two purposes.

- To tell all those who had been involved in the project the progress that had been made.
- To harvest any further comments on the system and possibly provide answers to any unresolved issues.

The meeting was very productive and the following issues were raised.

- Protecting the lists from people who are not part of the university.

This is an issue because there have been recent cases where booksellers and publishers have obtained a resource list and subsequently contacted the person who is responsible for it and then tried to get them to change the contents of it. There may also be intellectual property issues with ownership of the information. A possible solution to this issue is incorporating it in the VLE because this is accessed through a login process and so, can provide some protection from misuse.

- Use a recognised layout for the references – Harvard or Numeric.

The two most commonly used methods of citing references are Harvard and Numeric; neither is used for Talislist resource lists. At DMU the recommended method is to use Harvard, therefore the layout of the screen items should be in this format.

- General knowledge of libraries functions.

It was mentioned during the meeting that subject librarians would review lists before they were entered on the system. The fact that subject librarians existed was new to some members of academic staff. This highlights the fact that some academics are not making themselves aware of the resources available to support their teaching activities.

- Embedding reading lists in VLE to allow direct access to the information that supports teaching.

Part of this project was to investigate the potential for putting resource lists in the VLE alongside any teaching materials. Owing to the introduction of a new VLE at DMU and the brevity of project schedule it was not possible to complete this task. However, it will be carried out as the VLE develops and more teaching materials are added. The evaluation of Talislist has helped demonstrate the benefits of an inclusive approach to providing learning resources to students.

We have been in conversation with the technical team at TalisList and have agreed that we shall be using the hard-coding format suggested by TalisList for linking to lists from within the VLE for the immediate future, but will later be collaborating with them to develop a Blackboard building block to enable the creation of dynamic links to resource lists.

Review of modules as part of the curriculum changes for 2004. DMU is currently making some changes to the manner in which it teaches courses. It would be beneficial to use this opportunity to review resource lists and investigate the use of TalisList as the source for learning materials for students.

All of the meeting attendees thanked the DELIVER project team for keeping them informed and providing a format for discussing resource list issues. Therefore we would recommend that any organisation introducing a system such as Talislist use this method of keeping staff aware of developments and progress.

2.5 Summary of feedback

The feedback has been summarised in this section.

Data input:

- Typically takes 1 to 3 hours to enter a list.
- Need to know how to search and use the library electronic catalogue before you can link resources in Talislist.

Academics:

- Like the system.
- Want to know how to modify list, particularly to add and edit items.
- Think that students will print out lists, rather than store them electronically
- Have not stated any issues with duplicating paper based lists in electronic format.
- Want to know how students will be able to access the system.
- Need to make themselves aware of the services offered by the university's library.
- Would like the resource lists co-located with other learning materials in the VLE.
- Want Talislist to use the Harvard citation scheme.
- Want lists protected from people who are not part of DMU.

Library systems support:



- Talislist is not integrated with the library purchasing system but may be looked at in future versions.
- There were no reported problems with installing the system.
- Expect to be able to integrate lists with VLE- Blackboard, once further progress has been made in the VLE area. This progress is not part of the DELIVER project's remit and it involves getting modules on the system.
- Lists will be entered into Talislist as lecturers provide them to the library.
- Initially, Talislist will be launched with lecturers that have existing VLE modules.
- In time, it is likely that lecturers will be given permission to add and delete to existing lists but not allow them to start from scratch. This is owing to the difficulties of searching the library catalogue for item details and the benefits gained from using subject librarians to ratify lists.
- A member of the library will train staff – subject librarians first followed by clerical staff.

3. Conclusion and Recommendations

3.1 Conclusions

Talislist was bought by DMU for review and evaluation as part of the DELIVER project. From the feedback received and experience gained, the university will be using it as the method of providing electronic resource list to students from the academic year 2003 / 2004. The system integrates well with the library catalogue and supports the current methods of providing learning materials to students. Talislist allows the listing of all the items currently found on resource lists given to the library. It also provides capacity for listing other items such as past examination papers and key skills materials.

3.2 Recommendations

The following recommendations were made.

- It is recommended that future versions of Talislist should link to the purchasing side of the library system as this would provide a more integrated system.
- It is recommended that the list, when displayed on a computer, follow an agreed university citation format and Harvard is the preferred format.
- It is recommended that lecturers take the opportunity offered by the introduction of Talislist to examine their reading lists with a view to ensuring that they are providing the most effective learning resources to their students.
- It is recommended that the system should allow keywords to be added to lists.
- It is recommended that the library develop a set of preferred formats for reading lists. This would help teaching staff when writing or changing resource lists. This activity should be combined with any curriculum changes taking place.

Appendix A: Feedback from Data Entry

There were three sets of feedback from people who entered resources lists. They are presented in order and should be read as opinions contributing to the evaluation rather than direct statements on either the performance or quality of the system.

A1. First set

There are now 6 "published" reading lists viewable in TalisList. They should probably be regarded as being at the "Submitted" stage, as some of them include comments and queries made by the transcribers which would normally be resolved and removed before the publication stage. This exercise has revealed a number of problems that still need to be resolved as TalisList is introduced as a key part of the University's electronic information strategy. These problems seem mostly to relate to the way TalisList should be set up and the process for managing the content and its lifespan.

TalisList settings

- * An error message is displayed if the citation exceeds a certain limit. We may need to extend the limit, or find another way round this restriction.
- * There is an option to set the "Period" for a list. This is currently set to "Summer 03". We need to identify terms for describing periods that fit in with the course life cycle.
- * There are other menus or form fields that have not been used in the Lists transcribed so far. These include: Department, Type, Analysis code, and number of F/T and P/T students.

List management and lifespan

- * Is there a minimum set of data that we need to establish before working on a reading list: such as title, module code, and lecturer?
- * Should lists have expiry dates? By default only those updated to the current Period should be viewable.
- * How are new lists going to be added? Do we require a TalisList Designer to set up templates for others to complete? Or should everyone be trained in constructing lists?
- * Can we agree on a preferred colour scheme?
- * Are there any rules for when to copy from the original material or make corrections when errors become apparent?
- * Is the system of logging queries in square brackets appropriate for ensuring accuracy and appropriateness of list items?

Working on TalisList

I found that working on a list for half an hour helped to vary the day. TalisList transcribing is mostly straightforward and permits the setting of achievable goals. It may become daunting if too many lists are added in one go.

A2. Second set

Time:

Midwifery lists:

- first list took 2 hrs 30 mins to complete.
- second list took 1hr to complete.

Problems:

Reading lists:

- ISSNs and URLs on the reading lists, submitted for publishing, would help quickly identify the correct journal and website.
- Acronyms very unhelpful when trying to decide which website or database to link to. Particularly when it is an unfamiliar subject area.
- Separating out or clearly identifying which items are journals, websites, databases or other audiovisual material would speed up searching.

Personally I think whoever does the input needs to be reasonably familiar with OPAC searching. Particularly when trying to find titles with editors or corporate bodies as authors and journal entries.

TalisList:

Step-by-step instructions on how to create a list from scratch and add sub-headings etc. would be really useful. I did not find it clear from the screen, so it was a case of trial and error and asking until it was in the format I wanted.

Personal preferences:

Would it be possible to set the default to “draft” instead of “submitted”? This would mean once the record was found the “add and continue” link could be used instead of “add and edit”, saving time and eliminating two stages.

I found the fact that after it had added a record it took you back to the Web OPAC search result very annoying. Why doesn't it take you back to the TalisList screen, as this is the screen you need to be in, to click “n” for new record?

Overall impression:

Once you are in the list the actual adding and editing of records is very quick and straightforward.

I like the fact that you cannot delete a record without confirmation that you really want to.

You need to be able to concentrate whilst you are adding records as at one point I had four different windows open just to add one record.

A3. Third set

Time:

Pharmacy resource list

- It took 1 hour 50 minutes to enter the list.
- To update the list using the shopping harvesting tools, could take up to 6 minutes.

Problems:

Reading lists:

- There were several books by the same author often with similar titles so careful reading and searching was required
- Adding the notes or annotations was fine, but should they go before, after or be staff notes. A standard format for annotations would be useful
- How do you put in web addresses so that they provide active links?

TalisList:

- There is no tutorial, training or intuitive way of using the system.
- The banding, font size and colours became irritating after a few minutes and did not help with entering the list or viewing it. The same structure could be achieved through, clear and consistent placing.

Overall impression:

It is a simple system to use once learnt; however in order to learn it, experience of using OPAC for searching and linking is necessary. I don't feel that lecturers will want to learn how to use Talislist, because it is a specialised skill. But I do think that if the library enters the resource lists and it is promoted by everybody as the preferred method for referencing learning materials it could provide students with a good quality tool. Particularly if linked into other learning systems such as tutorials and the VLE. Talislist could greatly reduce the amount of duplicate effort and across the university.

Reading lists as they are currently written and formatted are not suitable for simple transfer to Talislist. Lecturers will need to change the format and amount of content on the list. Indeed, if the lists received for the current exercise are representative then there is a great variety in quality and quantity of learning material being recommended to students. For Talislist and from a learning effectiveness prospective shorter, more focused, annotated lists should be suggested.

Lastly, Talislist should be link to other university databases to provide a seamless and effective use of data across the many parts of the university.

Appendix B: Feedback from Academics

This feedback should be read as opinions contributing to the evaluation rather than direct statements on either the performance or quality of the system.

Feedback for Academics

Five academics provided resource lists that were subsequently entered on to Talislist. The academics were asked to look at the lists and provide some feedback. If their feedback was too general, then a second more specific request was sent that asked more direct questions.

Academic comments about their reading lists on Talislist.

Academic Comment 1

“Thank you for this, how can I add/amend it? There are several more books, web sites and, in particular journals I would like to add.

Also, how will the students get to know about it and access it?

And...yes, there's more questions, can I use it to put lecture notes/slides power point presentations on, or even discussion points? Thanks a million”

Academic Comment 2

“I have reviewed the pages and would like to make the following comments:

Some references do not begin with authors, which as students use Harvard system would be useful. All references are categorized in alphabetical order according to first author surname. Did you want me to make amendments now? I notice there are some references not complete or incorrect?

I wanted to add BNI to the website addresses but found this difficult to do and it did not register.

It is a repetition of what is in the module guide. However it may be useful, especially if in module guide format for students to then copy to file for using in their assignments. Also having it on line when they may not have their module guide with them may be useful when visiting the library itself. It is useful for me to see where I need to make amendments, but it would also be useful if new books come along that may fit in the list that these are highlighted by library staff and included for me to review and accept or reject.

Number of references may be a bit too many for a module guide as usually references are given per session. I was not sure why 3422 references were divided into two lots. Any ideas?”

Academic Comment 3

“Quite good, but a few niggling errors have crept in which I cannot edit out using the edit function.

I'll come over with a list soon.

Then I'll start collecting the reading lists for my other Modules.

And some time this Autumn I'll begin to stitch this all into Blackboard!”

Appendix C: Training Plan

A proposed training plan to be used at DMU

Aim: to introduce Subject Librarians to TalisList as a tool for Reading List Management.

Objectives:

As a result of this workshop, you will be able to:

- Collect the metadata required to identify a Reading List and its relationships to university members;
- Analyse the structure of a contributed Reading List;
- Adapt an existing TalisList template to match your reading list;
- Add the extra buttons to your browser so that you can use TalisList;
- Add content to your list by:
 - “Shopping” for references on OPAC;
 - Browsing on the WWW;
 - Manually adding items.
- Identify the key elements of quality control in Reading List development;
- Publish your Reading List.

Material:

TalisList Getting Started Guide [link for Talis customers only]

<<http://macbeth.talis.com/doc2/talislist/manual/TL-101-UG-01.pdf>>.

Requirements:

Please bring with you some examples of Reading Lists, which you might want to see added to TalisList.

Agenda:

- 10:00 – 10:10 Introductions;
- 10:10 – 10:15 Demonstration of TalisList;
- 10:15 – 10:30 Exercise 1: Metadata and Reading List structure;
- 10:30 – 10:45 Report back and design Reading List structure;
- 10:45 – 11:00 Configuring your Browser;
- 11:00 – 11:40 Exercise 2: Adding Content
- 11:40 – 11:55 Exercise 3: Checking and Publishing your list;
- 11:55 – 12:00 Evaluation